Managely Release Notes

January 2025

Version 5.3.44

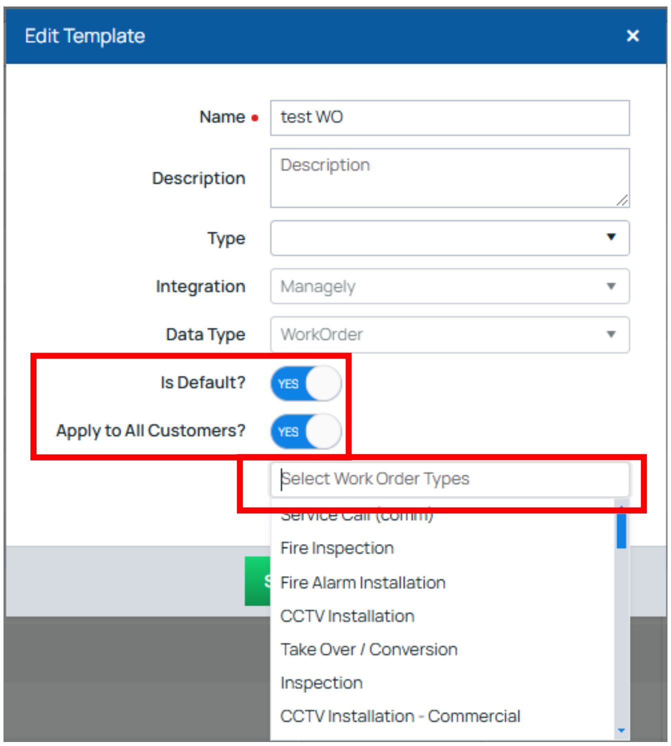
Contents

Enhancements

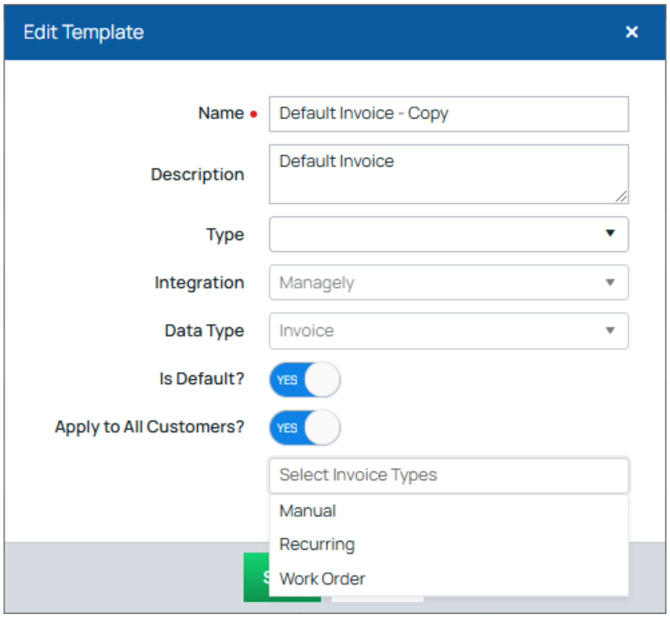
Bulk Update Work Order Type Customer Document Templates

On the Templates page (Templates & Forms > Templates), when editing a template with the Managely **Integration** the form shows a **Is Default?** switch. If this field is set to YES, there is another switch called **Apply to All Customers?** For invoices and work orders, if this switch is set to YES, there is a blank field that opens a list where users can select any number of invoice or work order types that the default template will be applied to.

Example work order type:



Example invoice type:



Branches Now Required on all Editable Entities

To eliminate reporting issues, we are enforcing the default branch ID set up on the System Default page (Setup > Company > System Defaults > Branch field) for every entity that already supports setting a branch.

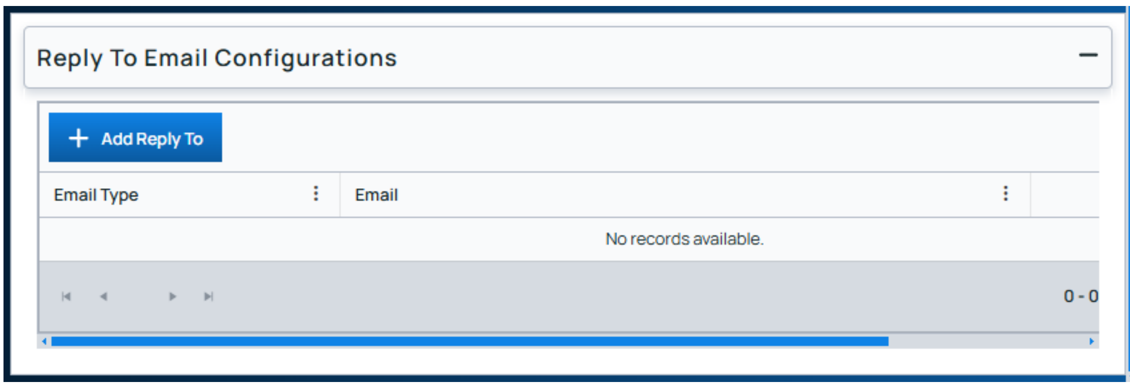
There were places that allowed adding a branch but did not require it. Now, adding a branch is required. The branch default comes from the System Default page. When opening any page that has a branch field that did not have a branch previously chosen, the branch field will populate with the default branch value. Users can change this to a different branch.

Note: Branches are a feature in Managely Pro.

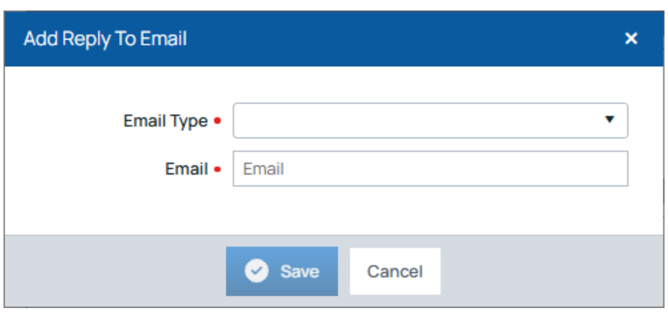
Editable Reply-To Address for All System Generated Emails [117915]

We added a feature to define the Reply-To Address for all emails that are sent from the system (fox example, Daily Email Summary, RMR Summary and Invoices, etc.). This is to help with everyday workflow of emails from the system.

To set up these reply-to email addresses, open the System Defaults page (Setup > Company > System Defaults). At the bottom of the page, click the + at the right of the Reply To Email Configurations section:



Click the **Add Reply To** button:



Choose an **Email Type**. These are various entities in Managely that can send emails such as calendar events, contracts, credit approvals, etc.

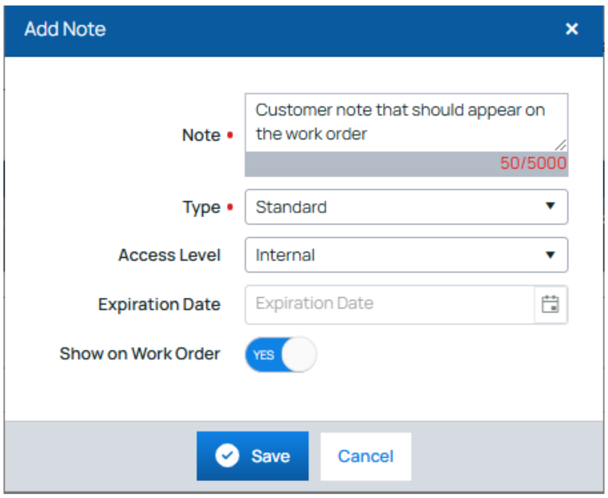
Type a valid **Email** address. This address will receive replies to any entity in Managely that sent an email. For example, if someone replies to a calendar event sent from Managely, this email address will receive the reply.

There are two options for existing reply to emails that have been configured: Delete and Edit. Edit only allows changing the reply to email address. If you need to change the email type, delete the configuration, select the correct email type and choose the email address.

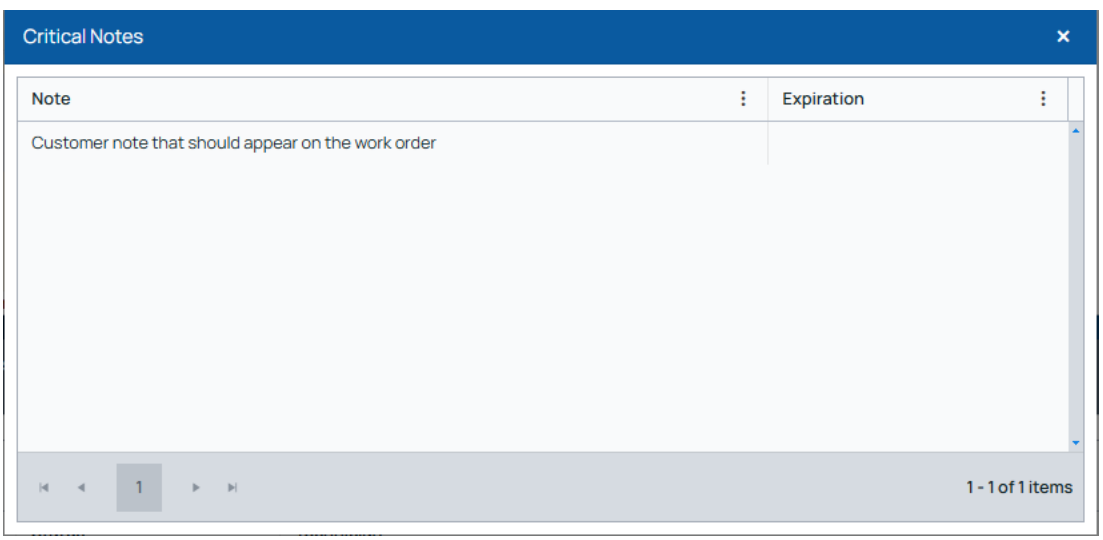
New Option to Show Customer Notes on Work Orders [120476]

We added a way for users to see customer notes when opening work orders for the customer.

Open a customer (CRM > Customers). Click the Notes tab. Click the **Add Note** button. On the Add Note popup, there is a new switch called **Show on Work Order**.



If this is set to YES, the note will appear when opening a work order for the customer.

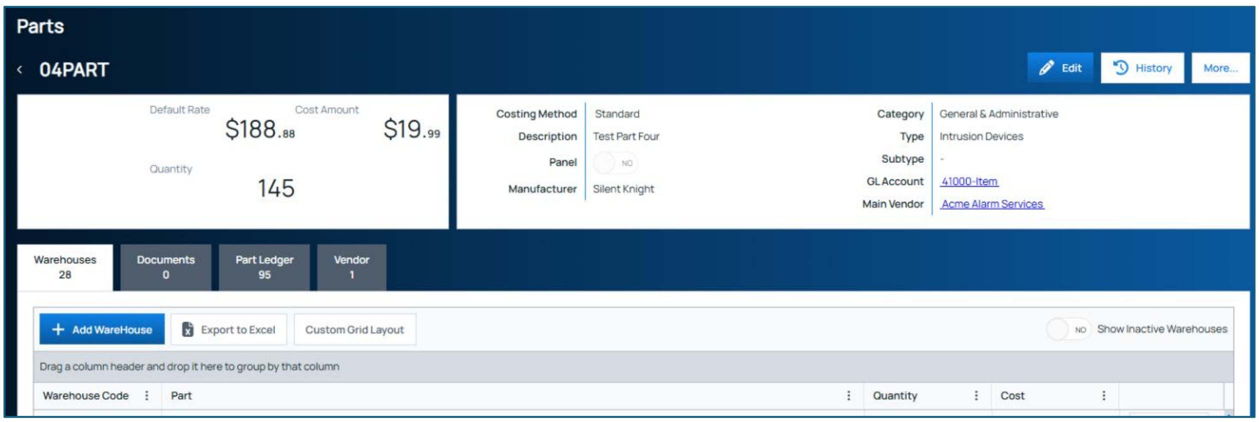


If there are multiple notes that should appear on the work order, each note will appear in its own line.

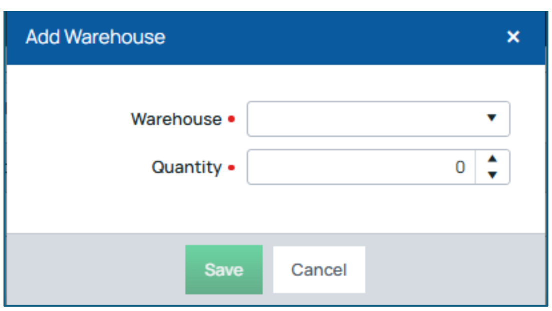
New Ways to Assign a Warehouse to Parts [120505]

We changed the part detail page (Setup > Items & Parts> Parts -OR- Inventory > Parts) and the Parts Uploader (Setup > Uploader > Parts Uploader) to include a way to add a warehouse.

On the part detail page, there is a new button called **Add Warehouse**.



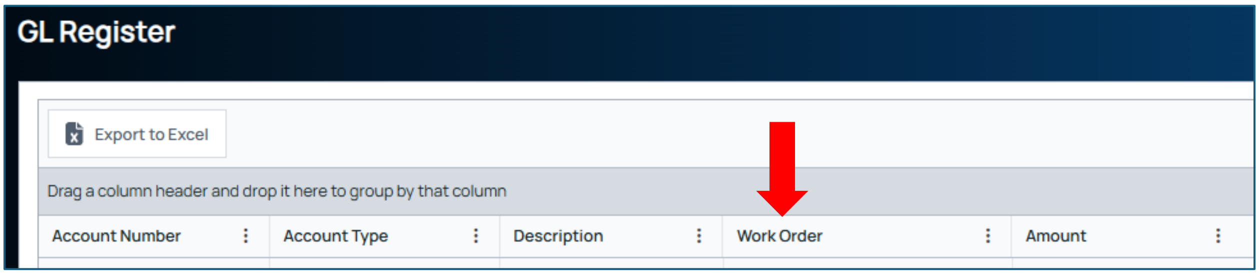
Click this button to open the Add Warehouse popup. Select an existing **Warehouse**. Enter a **Quantity** (the quantity can be zero). Click **Save**.



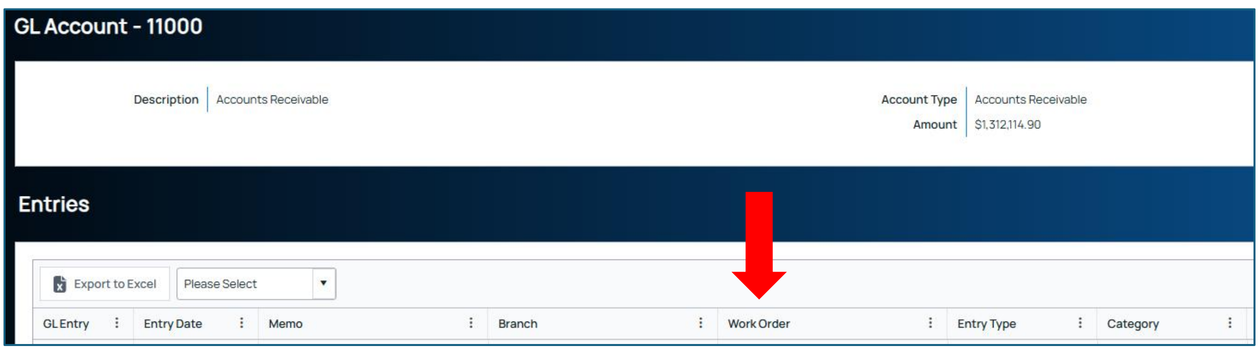
On the Part Uploader Template, there is a new column for the Warehouse Code. The warehouse code in Managely can be a maximum of 25 characters. To access the Part Uploader Template, on the Parts Uploader page, click the **Download Template** button.

Added Work Order Number as Available Column on GL Register Grid [121462]

We added the Work Order column to the GL Register page (GL > GL Register).



Also, we added the Work Order column to the GL Account page (GL > GL Register > GL Entry Number link).



Users can sort on the Work Order column and hide the column if needed.

Standardized Columns for Parts Export and Parts Uploader [121454]

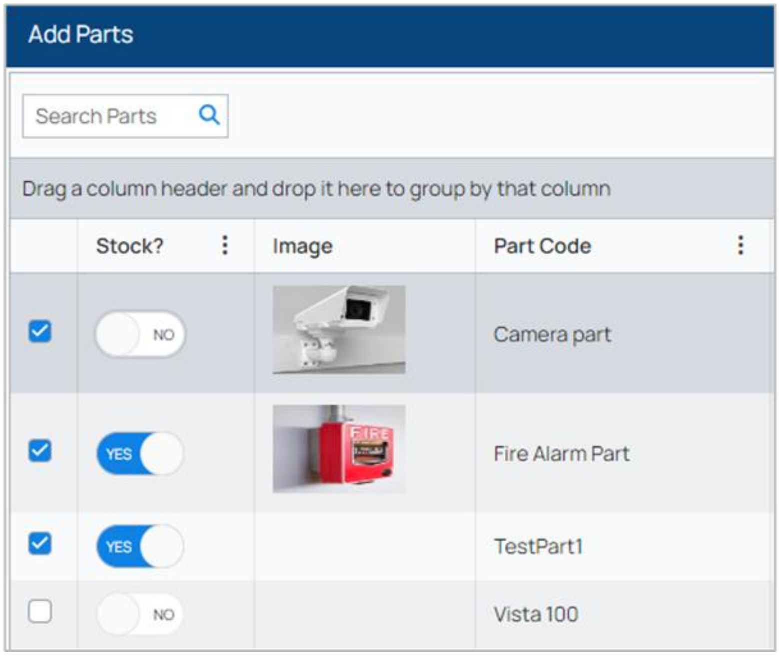
The Parts grid (Setup > Items & Parts> Parts -OR- Inventory > Parts) and the Parts Uploader (Setup > Uploader > Parts Uploader) now have the same columns, so that it is possible to export the parts from the Parts grid to Excel; make changes to the data; put the changed data in the Parts Uploader; and upload the changed part data. As part of this change, we added the Category column to the Parts Uploader.

Enhancements for Change Orders

We made additional changes for change orders:

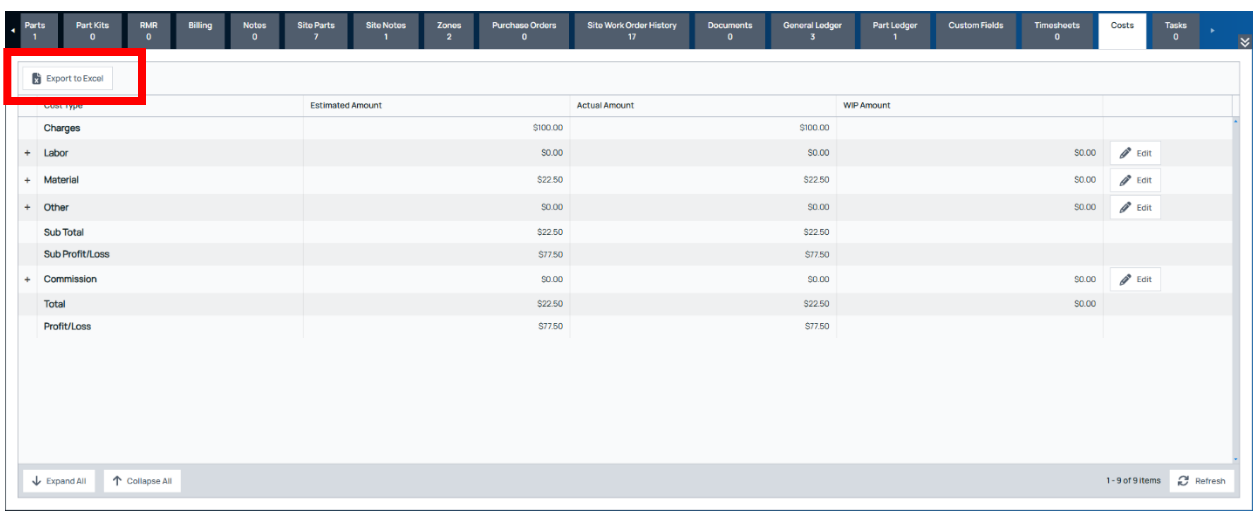
1. The Change Order grid now auto refreshes when making any billing or invoice changes.
2. All parts, items, etc. that are used on a change order are reflected in generated invoices.

3. The stock feature used when adding work order parts (this feature was added to Managely in v5.3.42) is now available for change order parts. When users add parts, the part picker shows a **Stock?** switch. Users can set this to YES or NO:



Export to Excel Added to Costs Tab on Work Orders [123189]

On the work order Costs tab (Accounts Receivable > Work Orders), we added an **Export to Excel** button above the grid.



Click this button to export the columns and values on the Costs tab to an Excel spreadsheet:

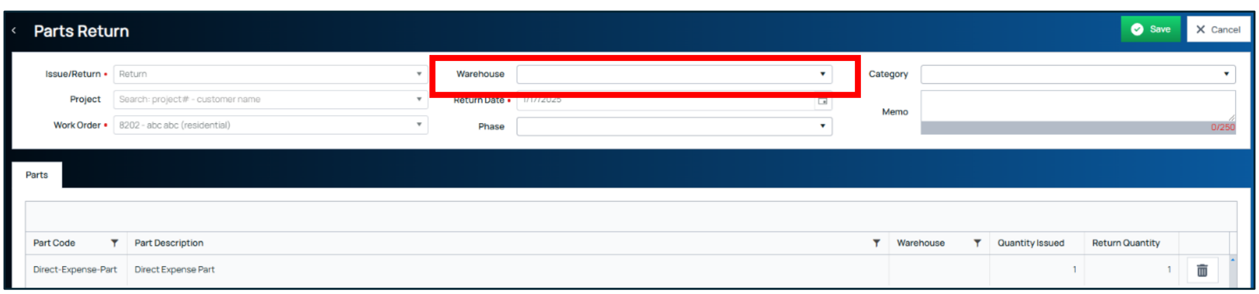
	A	B	C	D
1	Cost Type	Estimated Amount	Actual Amount	WIP Amount
2	Charges	100	100	0
3	Labor	0	0	0
4	Material	22.5	22.5	0
5	Other	0	0	0
6	Sub Total	22.5	22.5	0
7	Sub Profit/Loss	77.5	77.5	0
8	Commission	0	0	0
9	Total	22.5	22.5	0
10	Profit/Loss	77.5	77.5	0

Documents Move from Leads to Customers

Any documents that are added to leads (CRM > Leads) on the Documents tab transfer when the lead becomes an active customer. Transferred documents keep the Document Type and Access Level that were assigned in the lead's Document tab. Users can change these on the active customer's Document tab if needed.

Warehouse Field Open to Return Direct Expense Parts [125783]

Users can now return direct expensed parts to a warehouse. On the Parts Return page, showing a direct expense page, the Warehouse dropdown field is open for users to select a warehouse:



PDF File Invoices Now Show Sub-Customers Separately [119866]

When generating and printing statements for master customers, the PDF file for the invoices and statements includes data for all sub-customers; previously all of this was included together making it confusing and difficult to understand the individual data for each sub-customer. On the Invoices tab, Managely displays the data for each sub-customer separately under the master customer, so we implemented the same approach in the PDF file of the invoice, showing each sub-customer's data separately.

Customer #	Statement Date	Total Due	Amount Paid
1084	**01/17/2025**	**¤1,141.64**	**$**

To: Mason Cushing
123 street
Cleveland OK 44022

Remit To: Best Security
220 36th St #701
Chagrin Falls, NY 44023

Detach and return with your payment

Customer Name	Customer #	Statement Date	Amount Due
Mason Cushing	**1084**	**01/17/2025**	**¤985.92**

Invoices

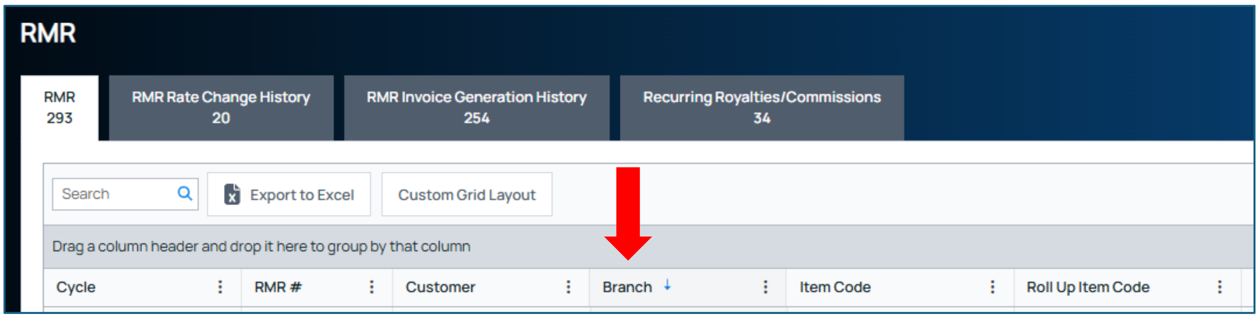
Invoice #	Invoice Date	Due Date	P.O. #	Invoice Amount	Amount Due
Aaron's Rentals - 3393					
5562	01/17/2025	02/16/2025		¤10.00	¤10.00
Cushing, Mason - 1084					
3985	05/06/2023	05/06/2023		¤232.92	¤232.92
5287	06/01/2024	06/01/2024		¤743.00	¤743.00

0-30 Days	31-60 Days	Over 60 Days	Late Fees	Open Credits	Total Due
¤10.00	**¤0.00**	**¤975.92**	**¤155.72**	**¤0.00**	**¤1,141.64**

O4:This is the Option Four Message that is setup in the Statement Rules.

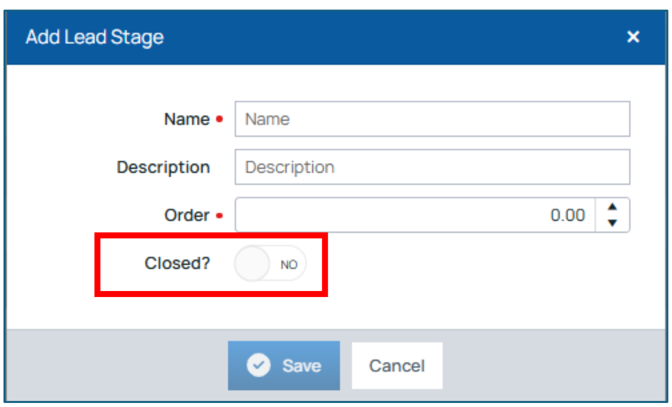
Added Branch Column To RMR Grid [124642]

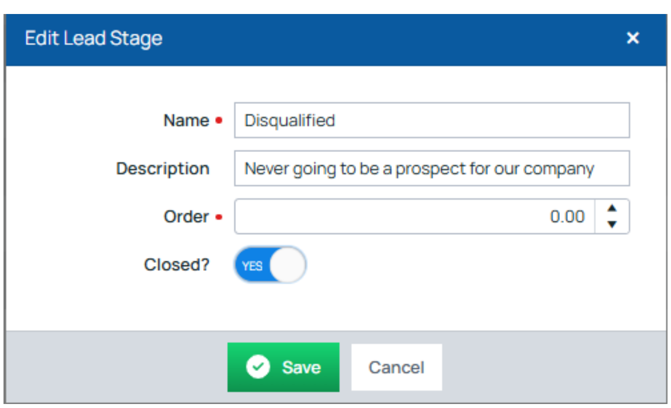
On the RNR page (Accounts Receivable > RMR), we added the Branch column to the grid. This branch value comes from the site. Users can sort on, filter, and move the branch column.



Leads can be Marked as Closed [125365]

On the Add Lead Stage/Edit Lead Stage forms (Setup > Lead Setup > Lead Stages), we added a switch called **Closed?** This is for marking a lead as closed. Users can create a lead stage with this switch set to YES to indicate that a lead with this stage is closed (or cancelled or disqualified).

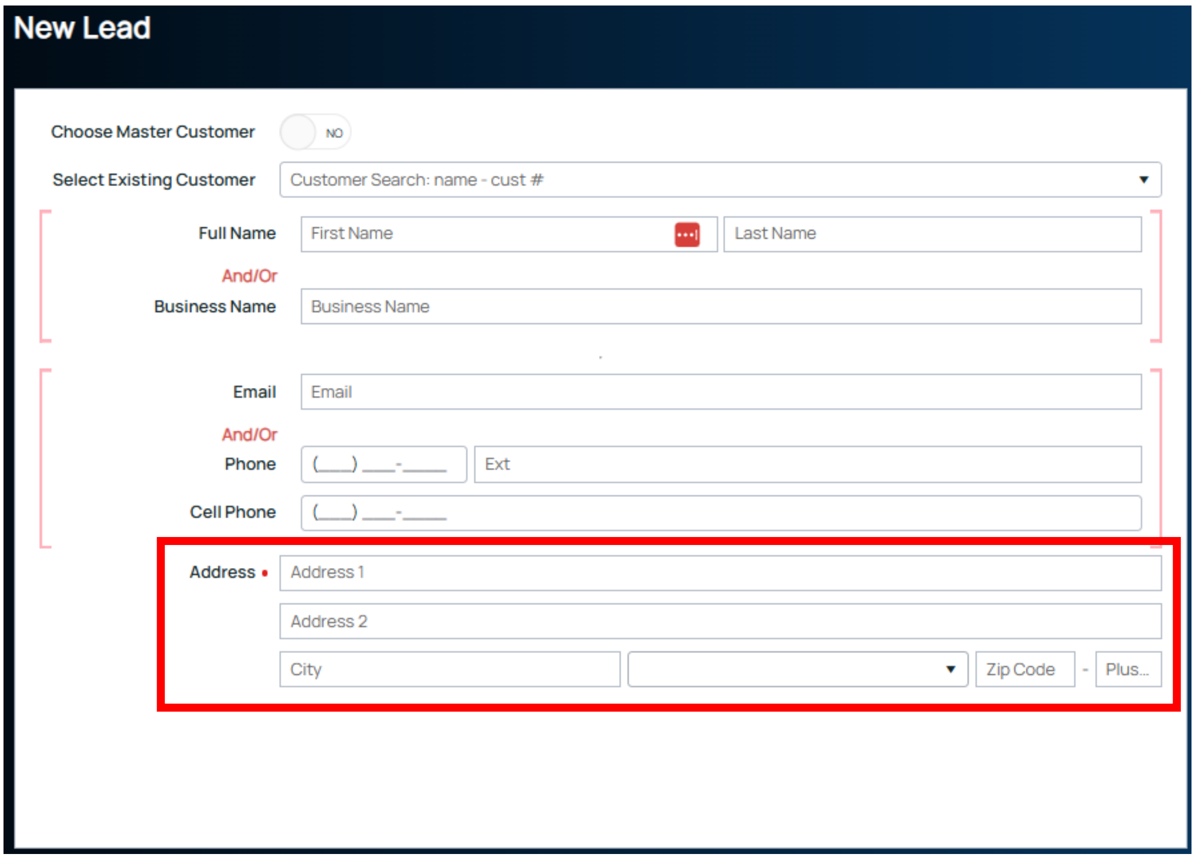




Users can select this lead stage on leads (CRM > Leads) if the lead should be closed. Users can see closed leads on the Leads page (CRM > Leads) when they change the Show Inactive Leads switch to YES.

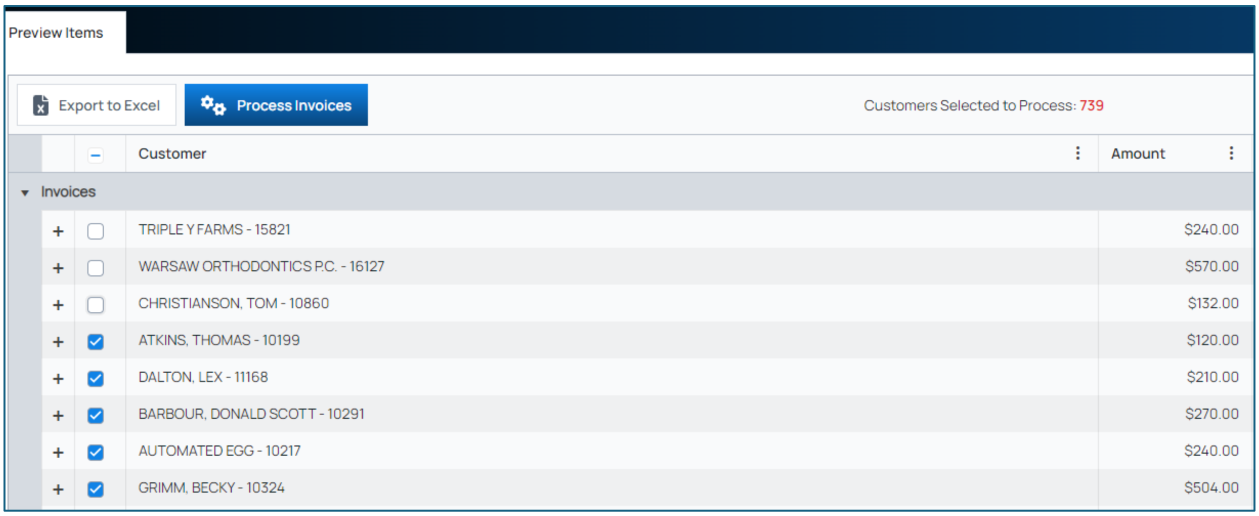
Address Fields Now Required on Lead Add/Edit Page

On the Leads page (CRM > Leads), the Address, City, State and Zip code fields are now required, as these are required for customers.



Enabled Individual RMR Unchecking on RMR Generation Screen

On the Recurring Invoice Generation page (Accounts Receivable > RMR > Recurring Invoices button), we changed the way users can select invoices for RMR generation to save time when only one RMR needed to be excluded. Now users can clear individual checkboxes after selecting all:



Application Corrections

Credits [115496]

We fixed an issue where invoices were doubled on the PDF file after clicking print preview. The credit branch ID is saved then a user applies the credit from the invoice. Also, the correct template is saved based on the branch and customer when a user applies the credit from the invoice.

Dealer has three licenses but cannot enable the third user [119494]

We fixed an issue that was preventing a dealer from enabling a user for each license.

Invoice batch error on invoice import [121840]

We fixed a condition that was causing an error when using the Invoice/Credit Uploader. In addition, we fixed a condition that was assigning a GL account to both the sales tax and item, which would also cause an error.

Cannot delete multiple Fields in eForms [123874]

We fixed an issue on an eForms template that was preventing users from deleting fields.

Receiving error 500 when filtering the custom fields column [124913]

To fix an error when filtering the custom fields, we hid the column menu for users, restricting filtering and sorting on custom field columns.

Cannot delete contracts; received deleted successfully message; contract still there [125686]

We fixed an issue that prevented contracts from being deleted properly.

132 RMRs haven't run [126168]

We corrected an issue with the Avalara integration that resolved and issue with RMR not completing and resulting errors.

AR Aging Report [126353]

The AR Aging Report showed an outstanding balance for a customer, but the customer details showed that the customer did not have an outstanding balance. We fixed this issue with the AR Aging Report. The report did not filter out invoices that were inactive or had been deleted.

Voided work orders are not showing up in the voided work order tab under work orders [127252]

The issue was caused by setting the void work order status to anything besides "Void", for example "Completed" as was previously the case (before the void status was added). The Void Work Orders grid was filtering out any work orders that did not specifically have the Void status. To accommodate these older work orders voided before the status was made available, the grid will filter based on the Voided Date. This will display these older work orders correctly as all voided work orders will have the voided date set.

Salesperson ID shared data field displaying incorrect value [127307]

When designing an eForm and adding a text box and adding the shared data form Shared.Proposal.SalespersonID, the data did not display as expected; however, it did display as expected when added on its own. We fixed this to display properly.

Purchase Orders no longer including memo since update [127217]

We fixed an issue with the purchase order template that was not showing the added logo or the added memo field text.

Unable to individually uncheck an RMR invoice from being generated on the Recurring Invoice Generation Screen [127928]

Users can now individually uncheck RMR invoices from being generated on the Recurring Invoice Generation page.

Customer portal users are missing the access level when creating online [128065]

Customer portal users created online are no longer missing the access level.

Dark mode site on proposal is illegible 128529]

We fixed the display site text in dark mode, so it is visible.